

About This Guide

This guide is designed to help you and your staff begin using Minimum Data Set (MDS), the Web-based, Group Level Evaluation Tool operated under the direction of the Center for Substance Abuse Prevention (CSAP). The guide has been designed to be customized in places to reflect your state's specific use of MDS.

It contains:

- Step-by-step instructions to service providers on how to enter service records in MDS
- Advice on where to find more information in MDS pertaining to service codes and categories, which can help you make consistent and informed decisions about the data you are entering
- Case study examples that help illustrate how certain kinds of services might be entered in MDS
- Instructions for generating reports and using report data in other documents.

We welcome your comments and suggestions on this review copy, which can be directed to the individuals listed on the back page.

Table of Contents

About This Guide.....	i
<i>Introduction to Minimum Data Set (MDS).....</i>	<i>1</i>
What Is Minimum Data Set (MDS)?	1
Who Can Use MDS?	2
Can I Try Out a Demo for MDS?	2
How Do I Access My State's MDS Site?	3
Find Out If Your State Has a Site	3
State URL and Contact Information.....	3
What If I Am a Computer Novice?.....	3
How Do I Move Around in MDS?	4
<i>Logging into MDS.....</i>	<i>5</i>
Log into MDS.....	5
Reset Your Password	7
Log Out of MDS.....	8
<i>Entering Services.....</i>	<i>9</i>
Help Is Available in Every Window.....	9
Tips for Using the Side Bar Links and Icons on the Page.....	10
Add Service – Standard Multi-Page Form	10
Service Data Entry: Part 1 -- Basic Information.....	10
Correcting Data Entry Errors	14
Service Data Entry: Part 2 -- Session Information	15
Service Data Entry: Part 3 -- Service Statistics.....	17
Service Data Entry: Part 4 -- User-Defined Fields.....	21
Returning to Your Most Recent Incomplete Record to Complete It	25
Tracking Your Answer History in MDS	25
Add Service – Alternate Single-Page Form	26
<i>Review or Edit an Existing Service.....</i>	<i>29</i>
Filter, Sort, and Generate a New List of Records.....	30
Verify That Your Records Have Been Finalized	31
Open a Record to Review or Edit It	32
Delete Records That You No Longer Need.....	33
<i>Create Reports.....</i>	<i>35</i>
Overview of MDS Reports	36
Services Provided Reports	36
Gender and Age Reports.....	36
Gender and Race/Ethnicity Reports.....	37
CSAP Strategy Reports.....	37
Detailed Reports	37
Graphic Reports	38
Download Report	38
Select Criteria to Generate a Table or Graphic Report	38
Data Filters	39

Categories	40
Copy Graphics or Tables From an MDS Report into Another Document	44
Copying Graphic Images	44
Copying Tables	44
Download Data to a Spreadsheet or a Statistical Program.....	45
<i>Maintain Your User Information</i>	46
Comments Are Requested on This Review Copy.....	48



Introduction to Minimum Data Set (MDS)

The MDS system was developed to enable states, substance abuse agencies, community-based service providers, and others to quantify and compare the numbers and types of primary substance abuse prevention and early intervention services delivered across the United States.



This User's Guide provides an overview of the MDS Web site and the tasks you can perform in it. This introductory chapter explains what MDS is, who can use it, where to access it, and how to get around in it.

The remaining chapters of the guide tell how to:

- Log into MDS, reset your password, and log out (Chapter 1)
- Enter and revise service records (Chapter 2)
- Review or edit an existing service record (Chapter 3)
- Create reports (Chapter 4)
- Maintain your user information (Chapter 5)

What Is Minimum Data Set?



Minimum Data Set (MDS) is a Web-based, Group Level Evaluation Tool operated under the direction of the Center for Substance Abuse Prevention (CSAP). The system was developed to enable states, substance abuse agencies, community-based service providers, and others to quantify and compare the numbers and types of primary substance abuse prevention and early intervention services delivered across the United States.

Service providers enter information into MDS on an ongoing basis about the services they are performing in their communities. In so doing, they are able to keep a systematic account of the valuable work they do.

The accumulation of data in the database makes it possible to explore the extent to which organizations are implementing various types of programs, and to see which general populations are being served. Many organizations may find that maintaining a complete track record in MDS also helps them satisfy reporting requirements for funding purposes.

The system is database-driven, which enables service providers to enter, store, and retrieve data. Anyone with access to MDS can generate reports using a number of predefined and user-selected criteria.

Who Can Use MDS?

There are two levels of user access to the MDS site—general and system administrator. A user's level of access is determined by the security settings associated with his or her login information.

- **General Access**
Users with general access to the site can use the data entry and reporting features to add or update data and generate reports from the database. Various levels of general user access exist, including provider, substate, and state administrators, which pertain to a range of data entry capabilities.
- **System Administrator Access**
Users with system administrator access to the site set up and maintain a variety of codes as well as establish state-specific data entry options. System administrators, like general users, also can use the data entry and reporting screens to add or update data and generate reports from the database.

Unlike general users and provider, substate, and state administrators, system administrators may view the Administrative Data Entry Menu. This menu provides access to several lookup tables where the administrator can add, modify, or remove items from the options that appear in selection boxes. The administrator can also view and modify user-defined fields for his or her state.

Can I Try Out a Demo for MDS?

At this time, there is a demonstration copy of the Prevention Minimum Dataset (MDS) Group Level Evaluation Tool that you may use for testing and review (see <http://prevtech.samhsa.gov/macro/csap/mds4>). However, the data you create in the demonstration version of the tool will not be saved.

How Do I Access My State's MDS Site?

Find Out If Your State Has a Site

If your state or agency has chosen to implement a version of the tool, you would access it in one of the following ways:

- On the Prevention Technology Platform (PrevTech) Web site at <http://prevtech.samhsa.gov/>. After you log into the site, your state's own tab if it has one (for example, CA or MO), will become visible immediately below the **State Systems** tab.
- Through another link that your state or agency will tell you about.

If your state or agency has not yet implemented a version of the Group Level Evaluation Tool, and you would like to have access to it, you should contact your CAPT to obtain more information. MDS is a free product and CSAP provides the technical support necessary to get the tool up and running.

State URL and Contact Information

Information for your state's own access to the MDS Web site, and your state's administrative contact, should you have questions, appears below.

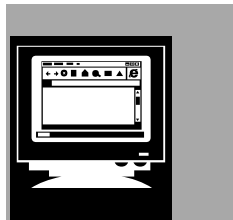
The [your state] URL for accessing the MDS Web site is:

[Example:
<http://198.178.200.205/xx/mds3/login.cfm>]

The [your state] administrative contact information for MDS is:

[Example:
Telephone: 1-800-555-1212
E-mail: admin@youremail.com]

What If I Am a Computer Novice?

















This guide does not explain basic computer use or how to navigate the Internet. If you need help in these areas, please refer to the documentation that came with your computer or consult your local educational resources. You should have all of the fundamental skills you need to use MDS if you already:

- know how to use your keyboard
- can perform basic computer tasks such as working with files
- are familiar with accessing the Internet through a browser program such as Microsoft Internet Explorer or Netscape Navigator.

How Do I Move Around in MDS?

Generally, you get around in MDS using links and buttons. For example, to move forward during data entry, you click **SAVE & CONTINUE** or **SAVE & FINISH** ↓. MDS buttons and icons are explained below.

Buttons and Icons Used in MDS

Image	Button Name	Functional Description
 Home	Home	Click the Home icon to return to the MDS main menu.
 Glossary	Glossary	Click the Glossary icon to view the MDS glossary of terms.
 FAQ	FAQ	Click the FAQ icon to access a file with answers to Frequently Asked Questions.
 Help	Help	Click the Help icon to access a file of specific Help topics.
	Codebook Definition	Click the Codebook icon next to a field label to see a list of definitions associated with each possible value in that category.
	Term Help	Click the Term Help icon next to a field label to go directly to that specific term in the Help file.
	Value Lookup	Click the Value Lookup icon next to a field label to select from a list of valid choices for the term.
	Login Button	Click the Login button to enter MDS after typing in your Login ID and password.
	Back Button	Click the Back button to go back to the previous page.
	Save and Continue Button	Click the Save & Continue button to save your work and continue to the next page.
	Save and Finish Button	Click the Save & Finish button to save your work and stop working until your next session.
	Delete Button	Click the Delete button to remove a specific entry from the database.
	Tables	Click the Tables button to create a report that displays data via tables.
	Graphic	Click the Graphic button to create a report that displays data via graphs.

Logging into MDS



When you access the URL for your state's live version of MDS, you will see a Login page where you will enter a login ID and password. The system administrator creates these settings for a first-time user. This chapter explains:

- How to log into MDS
- How to reset your password (if you are a first-time user)
- How to log out of MDS.

Log into MDS

When you access the URL for your state's live version of MDS, this Login page will appear:

The screenshot shows the login page for SAMHSA/CSAP's Prevention Minimum Dataset. The page has a white background with a black border. At the top left, it says "SAMHSA/CSAP's Minimum Data Set" in blue and orange. At the top right, there is a blue box with "SAMHSA CSAP" in white. The main title "Prevention Minimum Dataset" is in blue. Below it, it says "Welcome to the Prevention Minimum Dataset" in black. The word "Login" is in blue. There are two input fields: "Login:" and "Password:". Below the "Password:" field is a "Login" button. At the bottom, there is a blue box with white text that says "Forgot your user ID or password? Contact Your Admin Here at 1-800-555-1212 (sps-mis-support@qrc.com)." Below this, there is a paragraph of small text: "This system was developed to enable states, substance abuse agencies, community-based service providers, and others to quantify and compare the numbers and types of primary substance abuse prevention and early intervention services delivered across the United States."

MDS Login page

- 1 To log into MDS, click in the **Login** field and type your **login ID**.



Login

Login:

Password:

Login

- 2 Next, type your password into the **Password** field.



Login

Login:



Password:

Login

Note:
You won't be able to see what you type. This is for security reasons, to help you keep your password safe.

- 3 Click the **Login** button.
- 4a If your login attempt fails, you will see the following message in red text:

"Your Login and Password do not match. Please check your login and password and try logging in again, or contact your state administrator before you attempt to use the system."
- 4b If your login attempt succeeds, the main menu for MDS will open. The selections on the menu will match your access level—either general user access or system administrator access. The menu selections for general user access appear below:

	Add Service	Enter a new Service record.
	Edit Service	View/Edit Services already entered.
	Create Reports	Create a report from selected services or all available services.
	Administration	Edit, view, add administrative data items (e.g., Staff, Activity Codes).
	Your User Information	Change your password and other user information.
	Logout	End your current session.

MDS main menu for general users

- 5 Once inside MDS, you can proceed to work with any of the sections shown on the main menu.

Note: If you have stepped away from your desk for a while, your session will automatically time out (terminate). You will be returned to the **Login** page with this message:

"Your MDS session has timed out because too much time has passed without any activity. Please log back into the system to continue with your work."

Reset Your Password

If this is your first time accessing MDS, you may want to reset your password from the one your system administrator assigned to one that will be easy for you to remember.

- 1 In the main menu, click the link labeled **Your User Information**.



- 2 The **Administrative Data Entry: Existing Staff** window will open, displaying the data entry fields that appear in the example below:

Name	<input type="text" value="Rosa Ramirez"/>
Login	<input type="text" value="rosa"/>
Password	<input type="password"/>
Address (line 1)	<input type="text"/>
Address (line 2)	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="CA"/> ▼
Zip Code	<input type="text"/>
Phone Number	<input type="text"/>
Email	<input type="text"/>

Administrative Data Entry: Existing Staff window, for changing user information

Note:
Keep your new password in a safe place, and don't display it anywhere near your computer.

- 3** In the password field, backspace to clear the current information, then type in the password of your choice. Make it at least 6 characters long, and try to use both letters and numbers.
- 4** Click the **SAVE & CONTINUE** button, and your new password will be saved in the system. You will then be returned to the main menu.

Log Out of MDS

When you are finished with your current session, be sure to log out of MDS. Do one of the following:

- Close the browser window(s) in which you have been working with MDS. This will end your current session.
- If you'd like to keep your browser window open, click **Logout** in the main menu:

You will return to the Login page, where the following message will appear in red text: "You have successfully logged out of the system. To continue working, you will need to login in again."

Entering Services



Entering services in MDS involves creating new records for the services you are providing to the community. Each type of service may entail a different set of codes and details, which will be explained to some extent in this chapter. The chapter contains advice about where to find more information online, and includes a series of case study examples to illustrate how certain kinds of services might be recorded in the system. This chapter explains how to:

- Use the help available in every window
- Enter a new a service record -- using a multi-page form, as well as how to:
 - correct data entry errors
 - track your answer history
- Enter a new service record -- using a single-page (alternate) form.








To enter a new service record, click the Add Service link on the MDS main menu:



Help Is Available in Every Window

Once you access any of the main menu options, you will see a side bar containing links to **Home**, **FAQ**, and **Help**, as well as a legend explaining the special icons that may appear in that window. This side bar appears on every page in which you will be performing tasks.

Tips For Using the Side Bar Links and Icons on the Page

 Home	Click the Home icon to return to the MDS main menu.
 FAQ	Click the FAQ icon to access a file with answers to Frequently Asked Questions.
 Glossary	Click the Glossary icon to view the MDS glossary of terms.
 Help	Click the Help icon to access a file of specific Help topics.
	Click the Codebook Definition icon next to a field label to see a list of explanations associated with each possible value in that category.
	Click the Term Help icon next to a field label to go directly to the definition of that specific term in the Help file.
	Click the Value Lookup icon next to a field label to select from a list of valid choices for the term.

Add Service – Standard Multi-Page Form

The MDS standard form breaks your data entry process into four parts:

- 1 - Basic Information
- 2 - Session Information
- 3 - Service Statistics
- 4 - User-Defined Fields.

To use the multi-page form, click **Add Service** on the main menu:



Service Data Entry: Part 1 -- Basic Information

When you click the **Add Service** link on the main menu, **Part 1** of the multi-page form, the **Basic Information** section, opens first, as shown below. **Note:** Specific information may already appear in certain fields, depending on how your user account has been set up by your system administrator:

1 2 3 4

Service Data Entry: Basic Information

Staff (Login) ?

Provider ?

Substate ?

Service Code ? ☒ Single ☐ Recurring

Service Type ?






<< BACK DELETE SAVE & CONTINUE SAVE & FINISH

Part 1 of the multi-page Service Data Entry form: Basic Information

Instructions for entering data in each field of this section appear below. If you need assistance after reading the guide and using the online Value Lookup , Codebook Definition , and Term Help icons, please ask your administrator.



Staff (Login) 	<p>The Staff (Login) field refers to the name of the prevention service staff member who provided or oversaw the service. This field will be filled in with the default value for your login name, which may be appropriate.</p> <ul style="list-style-type: none"> If you need to change this value, click the Value Lookup icon to display a list of codes. Click the appropriate staff name on the list and it will appear on the form. Tip: Staff teams (staff members providing services jointly) may want to use a team code [T:0?] that represents the staff members' names or a team name. The ? represents the number of staff in the team. For example, [T:03] could refer to Amy, Holly and Mary.
--------------------------	--

Provider 	<p>The Provider ID is the alphanumeric code representing the organization providing the prevention service.</p> <p>If you work with more than one organization providing</p>
---------------------	--

	<p>services, you may need to change this value. Click the Value Lookup icon  to display a list of codes. Click the applicable provider name on the list and it will appear on the form.</p>
<p>Substate</p> <p>? </p>	<p>The Substate Entity is an alphanumeric code representing a geographic region, county, or district within or outside of the state where the service was provided.</p> <p>If you need to change this value, click the Value Lookup icon  to display a list of codes. Click the appropriate option on the list and it will appear on the form.</p>
<p>Service Code</p> <p>? </p> <ul style="list-style-type: none"> • Single • Recurring 	<p>The Service Code identifies the service as a single (one-time-only) or recurring service. In general:</p> <ul style="list-style-type: none"> • A single service is a one-time activity that, through the practice or application of recognized prevention strategies, is intended to inform or education general or specific populations about substance use or abuse (for example, a one-time student assembly). • A recurring service is a prevention service provided to a fixed group of people at risk for substance use or abuse, who are enrolled for a fixed period of time, in a planned sequence of activities. Typically such a service applies recognized prevention strategies, and is intended to inform, educate, develop skills, alter risk behaviors, deliver services and/or provide referrals to other services. For example, a recurring service may involve a parent education group that meets once a week for 6 weeks. • If you need guidance on selecting an option, click the Codebook Definition  icon to open a list of explanations for these terms. Clicking any link in this window takes you to its definition. Refer also to the information provided for the Service Type code, below.

Service Type

The Service Type code is the alphanumeric code representing the prevention service type.

- If you need to change this value, click the Value Lookup icon  to display a list of codes. Click the appropriate option on the list and it will appear on the form.
- If you need guidance on selecting an option, click the Codebook Definition  icon for a list of explanations for each service type. Clicking any link in this window takes you to its definition.
- **Tip:** As you read the definitions of various activities, you'll see also information about strategies and details about whether or not a particular activity is considered **single** or **recurring**. The Service Type definitions are therefore the best place to determine both the correct **Service Code** and **Service Type** for a particular activity.



Case Study Example for Part 1 -- Basic Information

Rosa Ramirez has been a counselor at Jefferson High for the past 10 years. At this point in her career, she would like to spend more time on community-based prevention work as well as school counseling. She wants to learn as much as possible about prevention programs, and help others in similar roles set up worthwhile programs in the community.

Example 1 -- Single (nonrecurring) service:

Rosa joins the Tri-City Drug Aversion Program Coalition. The first activity they work on together involves disseminating a community Resource Directory to the Westside PTAs. Here's how she recorded the activity in MDS:

Staff (Login)	Rosa Ramirez
Provider	55588 (Tri-City Drug Aversion Program Coalition provider code)
Substate	998 (This coalition is part of a statewide network.)
Service Code	Single (Although they visited several PTAs, this service type is only counted once.)
Service Type	STN15 (Materials development -- resource directory)

Example 2 -- Recurring service:

Rosa and the Boys and Girls Club next work together to sponsor a program called the "Lifestyle Club," a series of discussion groups for reinforcing healthy living and lifestyle patterns. Here's how she recorded the activity in MDS:

Staff (Login)	Rosa Ramirez
Provider	44744 (Boys and Girls Club provider code)
Substate	998 (The program is part of a statewide network.)
Service Code	Recurring
Service Type	STA05 (Community drop-in center participants)

When you have finished entering data into **Part 1**, click **SAVE & CONTINUE**.

Correcting Data Entry Errors

If you happen to click **Save & Continue** without entering all of the required information, or if you entered incorrect information, you may see one or more error messages such as these:

Error messages will appear inside of red boxes where information is missing or incorrect.




Staff (Login) ?	This value does not appear as a Login or a Staff Name in the database. Rosa Ramirez
Provider ?	This Field Cannot Be Left Blank. <input type="text"/>
Substate ?	This Field Cannot Be Left Blank. <input type="text"/>
Service Code ?	The Service Code and Service Type Code are incompatible. <input checked="" type="radio"/> Single <input type="radio"/> Recurring
Service Type ?	This Field Cannot Be Left Blank. The Service Code and Service Type Code are incompatible. <input type="text"/>

Error messages appearing in the multi-page Service Data Entry form

Any time this occurs, do the following:

- 1 Either make corrections or enter the missing data. (Use the value lookup icons and help tools available to assist you in selecting the correct choices.)
- 2 Click **SAVE & CONTINUE** again to move to the next data entry section, or click **SAVE & FINISH** if you have completed all four parts of your record.

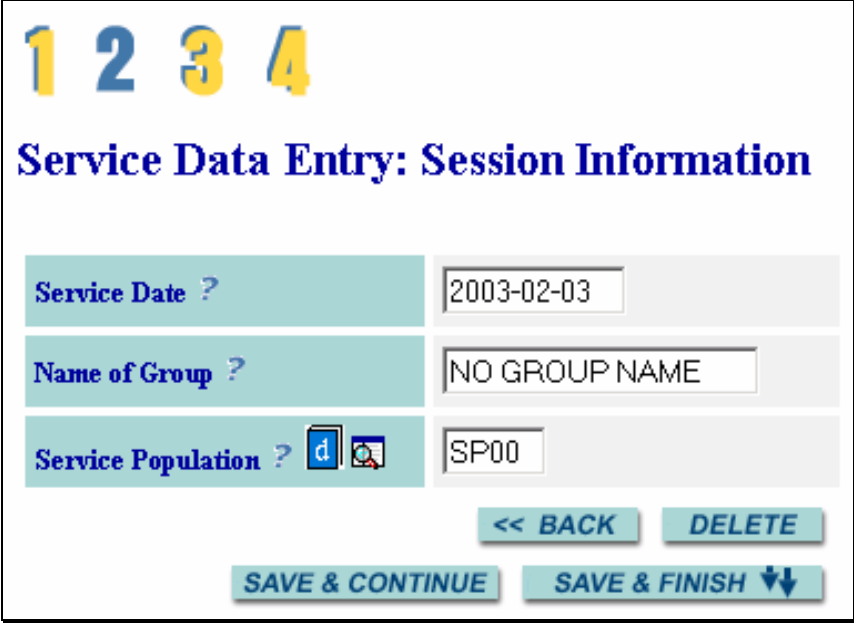
Service Data Entry: Part 2-- Session Information

Part 2 of the multi-page form, the **Session Information** section, opens next, as shown below. If you need assistance after reading the instructions below and using the online Value Lookup , Codebook Definition , and Term Help  icons, please check with your administrator.







The fields at right pertain to **single** (nonrecurring) services.



Additional fields will apply to **recurring** services, such as a **Session Number** and an **Activity Code**.

A **Unit Count** field will appear only as required by the Service Type you have selected.







Part 2 of the multi-page Service Data Entry form: Session Information




Service Date 	The Service Date is the date the service took place. (For recurring services, enter the date of one particular session.) It should be entered in the format YYYY-MM-DD.
Name of Group 	The Name of Group is the descriptive name of the group of individuals who received the service (for example, 6th grade, Class 2-A, Keller ES).
Unit Count  (Only required for certain Service Types.)	The Unit Count is the number of prevention items counted, distributed, disseminated, or developed (e.g., number of brochures). It is <i>not</i> the number of participants, attendees, unit costs, or units of time such as hours. The unit count appears only for those service types that do not require demographic data to be collected.
Service Population   	The Service Population refers to the population or specific groups that directly received the prevention services. <ul style="list-style-type: none"> If you need to research this value, click the Value

	<p>Lookup icon  to display a list of codes. Click the appropriate option on the list and it will appear on the form.</p> <ul style="list-style-type: none"> If you need guidance on selecting an option, click the Codebook Definition  icon for a list of explanations for each service population. Clicking any link in this window takes you to its definition.
--	---

The remaining fields apply to recurring services only:

<p>Session Number</p> <p> (For recurring services only)</p>	<p>The Session Number is assigned to each meeting of a recurring prevention service, and identifies the order of a session within the service plan. Session numbers should begin with 01 and increase for each service.</p> <p>Tip: If two separate activities or services are provided to a group during the same session, on the same day, two entries are made for the same session number. New participants would only be counted once.</p>
---	--

<p>Activity Code</p> <p>  (For recurring services only)</p>	<p>The alphanumeric Activity Code represents the recurring prevention service. Each Activity Code is uniquely associated with an Activity Description.</p> <p>If you need to research this value, click the Value Lookup icon  to display a list of codes. Click the appropriate option on the list and both the Activity Code and Activity Description will appear on the form in their respective fields.</p>
--	--

<p>Activity Description</p> <p>  (For recurring services only)</p>	<p>The Activity Description is a label for the activity being performed during a recurring service, and is directly linked to the Activity Code. It serves to link multiple sessions of the same recurring service with the same participants.</p> <p>If you need to research this value, click the Value Lookup icon  to display a list of codes. Click the appropriate option on the list and both the Activity Code and Activity Description will appear on the form in their respective fields.</p>
---	--



Case Study Example for Part 2 -- Session Information

Example 1 -- Single (nonrecurring) service:

Rosa and the Tri-City Drug Aversion Program Coalition visited five Westside school PTA meetings and handed out a total of 15 resource directories. Here's how she recorded the activity in MDS:

Service Date	2002-12-19
Name of Group	Westside PTAs
Unit Count	15 (for the total of the resources directories delivered)
Service Population	SP02 (Civic groups/coalitions)

Example 2 -- Recurring service:



Rosa and the Boys and Girls Club hold six discussions for drop-in members. Here's how she recorded the activity in MDS:

Service Date	2003-01-07
Name of Group	Lifestyle Club
Session Number	1 (for the first session in a series of 6 discussions)
Activity Code	0096 (the code designated for the Activity Description, below)
Activity Description	Lifestyles for Youth Meeting
Service Population	SP26 (Youth/minors)

When you have finished entering data into **Part 2**, click **SAVE & CONTINUE**.

Service Data Entry: Part 3 -- Service Statistics

Part 3 of the multi-page form, the **Service Statistics** section, opens next, as shown below. The number of fields is rather large, so the window has been presented in sections.

If you need assistance after reading the instructions below and using the online Value Lookup  and Term Help  icons, please check with your administrator.

1 2 3 4

Service Data Entry: Service Statistics

Attendees (Male) ?	<input type="text" value="0"/>
Attendees (Female) ?	<input type="text" value="0"/>
Total Present ?	<input type="text" value="0"/>
Counts Are ?	<input type="radio"/> Estimated <input checked="" type="radio"/> Exact

This is the first section of Part 3: **Service Statistics**, as it appears for a **single** (nonrecurring) service.

Recurring services will show **New Participants** instead of Attendees, along with a **Number Completed** field.

Part 3 of the multi-page Service Data Entry form: Service Statistics

Attendees (Male) ?	(For single services only) An Attendee is a specific individual who takes part in a <i>single</i> prevention service. For a single service, count all attendees in the service statistics.
Attendees (Female) ?	
New Participants (Male) ?	(For recurring services only) A New Participant is a specific individual who takes part in a <i>recurring</i> prevention service. For recurring services, count only <i>new participants</i> at this session (that is, those who have never attended a session of this recurring prevention service before).
New Participants (Female) ?	

Total Present ?	The Total Present is the total number of attendees or new participants taking part in the prevention service. <ul style="list-style-type: none"> For a single service, this value should equal the sum of the male and female attendees. For a session of a recurring service, this value should reflect the total present at the activity, regardless of whether there are new participants. In many cases, this figure will be larger than the sum of the new male and female participants.
------------------------	---



Number Completed ? (For recurring services only)	The Number Completed is the number of participants completing a recurring series of prevention services. Requirements for "completing" a service will vary from provider to provider and even from service to service, but may include: <ul style="list-style-type: none"> the participant being present at a specified
--	---

	<p>number of sessions</p> <ul style="list-style-type: none"> • completing an examination or concluding activity • other conditions as might be set forth in advance. <p>For some services, all participants completing the service will do so at the same time, while for others, participants may complete the service over the course of several sessions.</p>
--	--


<p>Counts Are</p> <p>?</p> <ul style="list-style-type: none"> • Estimated • Exact 	<p>The Count reflects the level of accuracy of the demographic information.</p> <ul style="list-style-type: none"> • Exact counts may be obtained from registration forms, surveys, or other records. • Estimated counts can be entered when no specific information exists.
--	--

This is the second section of Part 3: **Service Statistics**

25-29	<input type="text"/>
30-34	<input type="text"/>
35-39	<input type="text"/>
40-44	<input type="text"/>
SAVE & CONTINUE	






Attendees/Participants By Age	
Age 0-4	<input type="text"/>
Age 5-11	<input type="text"/>
Age 12-14	<input type="text"/>
Age 15-17	<input type="text"/>
Age 18-20	<input type="text"/>
Age 21-24	<input type="text"/>
 Age 25-44	<input type="text"/>
 Age 45-64	<input type="text"/>
Age 65+	<input type="text"/>


Attendees/Participants by Age: Enter the applicable number of attendees or new participants in each age group.

For age groups **25-44** and **45-66**, click the Value Lookup icon  to display a list of age subcategories. Enter the appropriate number of attendees or new participants for each age subcategory. Click **Save & Continue** to save the entries.

This is the third section of Part 3: **Service Statistics**

Puerto Rican	<input type="text"/>
Cuban	<input type="text"/>
Mexican	<input type="text"/>
Other Hispanic/Latino	<input type="text"/>
SAVE & CONTINUE	


Attendees/Participants By Racial/Ethnic Category	
 American Indian/Alaska Native	<input type="text" value="0"/>
 Asian	<input type="text" value="0"/>
 Black/African American	<input type="text" value="0"/>
 Hispanic/Latino	<input type="text" value="0"/>
 Native Hawaiian (Including Part Hawaiian) & Pacific Islanders	<input type="text" value="0"/>
White/Caucasian	<input type="text" value="0"/>
Multi-Racial	<input type="text" value="0"/>
Other	<input type="text" value="0"/>

Attendees/Participants by Racial/Ethnic Category:
Enter the applicable number of attendees or new participants per category.
For **American Indian, Asian, Black/African-American, Hispanic/Latino, and Native Hawaiian** categories, click the Value Lookup icon  to display a list of race subcategories. Enter the number of attendees or new participants for each subcategory. Click **Save & Continue** to save the entries.



Case Study Example for Part 3 -- Service Statistics

Example 1 -- Single (nonrecurring) service:

MDS does not collect demographic data for certain service types, including service type STN15, which pertains to the distribution of resource directories. While Rosa was entering information for this activity, MDS informed her that she would not need to record any demographic data for this service. She had also learned this as she entered her data in Part 1, where she used the Codebook Definition icon  in MDS to look up detailed information about service type STN15.

Example 2 -- Recurring service:

Rosa conducts her six drop-in discussion sessions with the Boys and Girls Club members. The attendance fluctuates, with a few new participants joining some sessions, and others missing. All attendance records are maintained on a sign-in

Part 1	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
New Participants (Male)	6	1	0	0	1	0
New Participants (Female)	4	2	0	0	0	0
Total Present	10	13	12	8	11	12
Number Completed	—	—	—	—	—	8
Counts Are	Exact	Exact	Exact	Exact	Exact	Exact

roster. Here's how she recorded the statistics in her six MDS service records:

Part 2: Attendees/Partici- pants by Age	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Age 5-11	2	1	0	0	1	0
Age 12-14	8	2	0	0	0	0

Part 3: Attendees/Partici- pants by Ethnic/ Racial Category	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
White	3	0	0	0	1	0
Black	2	0	0	0	0	0
Native American (Other)	1	0	0	0	0	0
Asian/Pacific Islander (Filipino)	1	0	0	0	0	0
Hispanic/Latino (Mexican)	3	3	0	0	0	0
Multi-Racial	0	0	0	0	0	0

When you have finished entering data into **Part 3**, click **SAVE & CONTINUE**.

Service Data Entry: Part 4 -- User-Defined Fields

Part 4 of the multi-page form, the **User-Defined Fields** section, opens next, as shown below. Some user-defined fields are predefined, and others can be set up by your system administrator for specific projects. The user-defined fields shown below are the ones that have been predefined in the system. If you need assistance after reading the instructions, please check with your administrator.

1 2 3 4

Service Data Entry: User-Defined Fields

Primary Risk/Protective Factor	<input type="text"/>
Secondary Risk/Protective Factor	<input type="text"/>
IOM Category	<input type="text"/>
Funding Source	<input type="text"/>
Hours of Direct Service	<input type="text" value="0.0"/>
Hours of Indirect Service	<input type="text" value="0.0"/>
ZIP Code	<input type="text"/>

Part 4 of the multi-page Service Data Entry form: User-Defined Fields

Primary Risk/Protective Factor	A Risk Factor is a condition for a group, individual, or defined geographic area that increases the likelihood of a substance use or abuse problem occurring.
Secondary Risk/Protective Factor	<p>A Protective Factor is a condition that builds resilience to substance abuse and can serve to buffer the negative effects of risks.</p> <p>Click on the drop-down menu bar to open a list of risk and protective factors. Scroll through the list to locate and highlight your primary factor and secondary factor, and each will appear on the form.</p>

IOM Category	<p>The IOM Categories come from the Institute of Medicine's characterization of prevention interventions into three categories: Universal, Selected, and Indicated.</p> <ul style="list-style-type: none"> • Universal interventions for families apply to general populations of families and youth. Examples include school-based, media-based, and community-based interventions to prevent substance abuse. • Selected interventions are designed for high-risk individuals or families as members of at-risk subgroups. Selected interventions are generally longer in length, and more intrusive by involving parent and youth to target behavioral changes.
---------------------	--

	<ul style="list-style-type: none"> • Indicated prevention programs are designed to address multiple risk factors in individual families. These identified or diagnosed problems could include school failure, delinquency, non-compliance or drug use in the child or indicators of parenting dysfunction such as child abuse or neglect. Indicated prevention programs are more intrusive and longer. • Click on the drop-down menu bar to select a category, and it will appear on the form.
--	---

Funding Source	For cost analysis purposes, some states and agencies collect information about the funding sources for the service provided. Funding may include one or more different sources.
-----------------------	---

Hours of Direct Service Hours of Indirect Service	Hours of Direct and Indirect Services may be used to help plan, budget, and schedule services for other programs, or to compare, for example, the costs of implementing a program in different settings.
--	--

ZIP Code	The ZIP Code pertains to the area in which the service was provided.
-----------------	--



Case Study Example for Part 4 -- User-Defined Fields

Example 1 -- Single (nonrecurring) service:


Rosa and the Tri-City Drug Aversion Program Coalition identified applicable risk and protective factors for the Westside PTA information program. Here's how she recorded the remaining information in MDS:

Primary Risk/ Protective Factor	Social Support (code 60)
Secondary Risk/ Protective Factor	Leadership/Mentoring (code 20)
IOM Category	Universal
Funding Source	Grant (obtained through a state agency)
Hours of Direct Service	32
Hours of Indirect Service	7
Zip Code	90000

Example 2 -- Recurring service:

Rosa and the Boys and Girls Club identified the applicable risk and protective factors for the Lifestyle Club program. Here's how she recorded the remaining information in MDS:

Primary Risk/ Protective Factor	Attitude Toward Use (Disapproval of Drug Use) (code 8)
Secondary Risk/ Protective Factor	Decision Making/Problem Solving (code 54)
IOM Category	Universal
Funding Source	Grant (obtained through a charitable foundation)
Hours of Direct Service	2 (on average; varied for each of the 6 records)
Hours of Indirect Service	4 (on average; varied for each of the 6 records)
Zip Code	90000


When you have finished entering data into **Part 4**, click  to finalize the record. You will see a screen with several options as shown below.

Your Service Record has been completed, validated, and timestamped. Do you now want to:

☒ Continue and enter another similar service
 (All data will be pre-populated except for Service Date, Session Number, Demographics, and User-Defined Fields.)

☐ Continue and enter a blank service

☐ Return to Home Page



Add Service Continuation Page

You have the option to **Continue and enter another similar service**, **Continue and enter a blank service**, or **Return to Home Page**.

If you would like to enter a new service similar to the one you just finished, select **Continue and enter another similar service**. All data will be pre-populated except for Service Date, Session Number, Demographics, and User-Defined Fields.

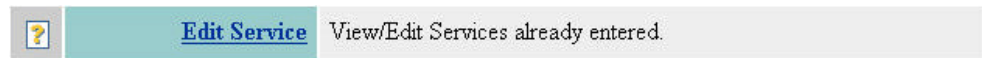
If you would like to enter a new service that is not similar to the one you just finished, select **Continue and enter a blank service**.

If you have no further records to enter in this session, **Return to Home Page** to return to the MDS main menu, where you can log out of the system.

Returning to Your Most Recent Incomplete Record to Complete It

If you enter information for a service record, but need to stop your session prior to clicking **SAVE & FINISH** ↓↓, your record will be incomplete. However, as long as you have been clicking **SAVE & CONTINUE** as you go (in the multi-page data entry form), your record will be saved for you to finish during a future session.

To return to an incomplete record and continue editing it, click **Edit Service** in the MDS main menu:



For more information see **Chapter 3: Review or Edit an Existing Service**.

Tracking Your Answer History in MDS

You may have noticed that MDS records the information you have been entering and saving as part of your **Answer History** at the bottom of each window. The Answer History shows the data you have entered in each section of the record -- other than in the section in which you are currently working.

For example, if you are working in Part 1, **Service Data Entry: Basic Information**, your answer history at the bottom will show what you have entered for Parts 2, 3, and 4, as shown in the example below:


Answer History
2. Session Information: Service Date: 2002-12-19 00:00:00 Name of Group: Westside PTAs Unit Count: 15 Service Population: SP02: Civic Groups/Coalitions
3. Service Statistics: Demographics Not Required
4. User-Defined Fields: Primary Risk/Protective Factor: 60 Secondary Risk/Protective Factor: 20 IOM Category: U Funding Source: Hours of Direct Service: 32.0 Hours of Indirect Service: 7.0 ZIP Code: 90035

Example of the Answer History for the multi-page Service Data Entry form

As you proceed through each section, during each of your data entry sessions with the multi-page form, the Answer History window enables you to review the entries you have made.

Add Service – Alternate Single-Page Form

The single-page alternate form combines all four data entry sections into one long form. This combined form can be very useful when you have several records to enter at one sitting. To create a new service record using the alternate form, first change the default form in **Your User Information**:

 **Your User Information** Change your password and other user information.

At the bottom of the form is a dropdown menu labeled **Data Entry Form**. Here you can set the default form to use.

Data Entry Form

Four-Page Data Entry Form	▼
Single-Page Data Entry Form	
Four-Page Data Entry Form	

The alternate form contains all four data entry sections in one window.

Select **Single-Page Data Entry Form** from the list to use the alternate form. Then click **SAVE & CONTINUE** to save your changes.

Go back to the main menu and click the **Add Service** Link. You will now see the alternate form.

The first two sections of the four-section form appear below. Data entry fields that do not apply to one or the other of the service codes (single or recurring), or to a particular service type, will appear gray. This signifies that MDS will only make those fields available for entry if they apply to a specific type of service.

Data entry fields that do not apply to a particular service code (single or recurring), or to a particular service type, will remain dimmed.

You won't be able to enter anything in those fields unless they apply to the type of service you are recording.

Part 1: Basic Information

Staff	<input type="text" value="rosa"/>
Provider	<input type="text" value="NONE"/>
Substate	<input type="text" value="998"/>
Service Code	<input type="text" value="S"/> (Single/Recurring)
Service Type	<input type="text" value="STZ00"/>

Part 2: Session Information

Service Date	<input type="text" value="2003-02-03"/>
Name of Group	<input type="text" value="NO GROUP NAME"/>
Unit Count	<input type="text" value="0"/>
Session Number	<input type="text" value="0"/>
Activity Code	<input type="text" value="ZZZ000"/>
Activity Description	<input type="text" value="No Activity Code Selected"/>
Service Population	<input type="text" value="SP00"/>

First two parts of the Alternate Service Data Entry form


At the top of the alternate form window, you will see the navigation guide shown below. This guide explains how to use various combinations of keys on your keyboard to jump quickly around the form, as well as display information.

Guide to Hotkeys and Navigation			
Control-H	View Context-Sensitive Help	Control-1	Jump to Data Entry Section 1
Control-G	Go to a List of Valid Values	Control-2	Jump to Data Entry Section 2
Control-D	See Definitions of Valid Values	Control-3	Jump to Data Entry Section 3
Control-S	Submit Form	Control-4	Jump to Data Entry Section 4
Control-Up Arrow	Move to top of form	Control-Down Arrow	Move to bottom of form

Guide to Hotkeys and Navigation at the top of the window


For example,

- To display Help, press the <Control> and <H> keys at the same time.
- To move forward from one field to the next, press the <Tab> key.
- To move backward, press the <Shift> and <Tab> keys at the same time.

- 1 To create a record using the alternate form, enter information exactly as you would using the multi-page form described earlier in this chapter.
- 2 When you have finished data entry, click  to finalize the record. You will return to the start of a new record to enter.
- 3 If you have entered incomplete or incorrect information, one or more error messages in red boxes will appear, such as the ones shown below.

Error messages will appear inside of red boxes where information is missing or incorrect.

Part 1: Basic Information	
Staff	<input type="text" value="rosa"/>
Provider	<div style="background-color: red; color: white; padding: 2px;">You must enter a Provider for this Service.</div> <input type="text" value="NONE"/>
Substate	<input type="text" value="998"/>
Service Code	<input type="text" value="S"/> (Single/Recurring)
Service Type	<div style="background-color: red; color: white; padding: 2px;">You must enter a Service Type for this Service.</div> <input type="text" value="STZ00"/>

- 4 To remove the errors, simply correct or enter the missing information, then click  again to finalize the record.

Review or Edit an Existing Service



The Review/Edit an Existing Service option enables you to generate a sorted list of service records that you, or anyone within your scope, has created. From that list, you can open any record to view it, and edit the record if it is not complete.

This chapter explains how to do the following:

- Filter, sort, and generate a list of service records
- Verify that your records have been finalized, which ensures that they will appear on reports
- Open a record to review or edit it
- Delete records that you no longer need.

Start by clicking **Edit Service** on the MDS main menu:

	Add Service	Enter a new Service record.
	Edit Service	View/Edit Services already entered.
	Create Reports	Create a report from selected services or all available services.
	Administration	Edit, view, add administrative data items (e.g., Staff, Activity Codes).
	Your User Information	Change your password and other user information.
	Logout	End your current session.

MDS main menu for general users

The following window will open, containing records such as the ones shown in the example below:

View/Edit Existing Services

[Home](#)
[FAQ](#)
[Help](#)

Your State Administrator has set a limit of 120 days, during which you may enter or modify service data. Records which are older than this may be viewed but may not be edited without the permission of your State Administrator. Click on to edit a service, to view a service.

By default, all records falling into the system time limit of 120 days will be displayed.
 Use the select lists to limit the number of records displayed.
 To select a range of dates not listed, select "Custom" from the *Service Date Range* list and enter the dates in the boxes below.
 Dates should be entered in the format MM-DD-YYYY.
 Starred Records have been submitted for final validation.

Sort By:
Entered/Changed By:
Service Date Range:

Custom Range Begin:
Custom Range End:

DISPLAY SERVICE RECORDS

Delete	New Service Like This One	View or Edit This Record	Group Name	Service Date	Provider Code	Service Code	Activity Code	Session Number
				1/7/2004	MNP	S		
				1/14/2004	NONE	R	ZZZ000	0
			*	2/2/2004	MADD01	S		
			Another XX Test	1/21/2004	22222	S		

Sample list that appears in the View/Edit Existing Services window

Filter, Sort, and Generate a New List of Records

To change the default set of records that appears in this list, you can:

- 1 Use a filter to select a larger set of records. For example, you can increase the number of records that normally appear by selecting a different option in the **Entered/Changed By** drop-down menu. The default setting is **Me**, which refers only to the records that are associated with your Login ID. If you select **Anyone in my scope**, you will retrieve a list that also includes records created by others in your group. Your administrator will give you access to the records that you need to manage.

Entered/Changed By:

Me
 Anyone in my scope

- 2 Use a filter to select a smaller set of records by date. The default setting is the **Within System Time Limit**. You can select other options in the **Service Date Range** drop-down menu, including **Today**, **Last Week**, and **Last Month**.

Service Date Range:

12/17/2003 - 4/14/2004: Within System Time Limit ▼

12/17/2003 - 4/14/2004: Within System Time Limit

11/26/2002 - 4/14/2004: All

4/14/2004 - 4/14/2004: Today

4/13/2004 - 4/13/2004: Yesterday

4/11/2004 - 4/14/2004: This Week

4/01/2004 - 4/14/2004: This Month

4/01/2004 - 4/14/2004: This Quarter

1/01/2004 - 4/14/2004: This Year

4/04/2004 - 4/10/2004: Last Week

4/04/2004 - 4/14/2004: Last Week to date

3/01/2004 - 3/31/2004: Last Month

3/01/2004 - 4/14/2004: Last Month to date

1/01/2004 - 3/31/2004: Last Quarter

1/01/2004 - 4/14/2004: Last Quarter to date

1/01/2003 - 12/31/2003: Last Year

1/01/2003 - 4/14/2004: Last Year to Date

Custom: Enter Beginning and End Dates Below

- 3 Select a different sorting option from the **Sort By** drop-down menu. The default setting is **Group Name**, but you might prefer to sort by **Provider**, for example.

Sort By:

Group Name ▼

Group Name

Service Date







Provider

- 4 When you have selected the combination of filters and the sorting option you desire, click **DISPLAY SERVICE RECORDS** to generate a new list.

Verify That Your Records Have Been Finalized

Any record that appears in the list without an asterisk next to it is not finalized, and the associated data will not appear in a report. You finalize a record when you click **SAVE & FINISH** in a data entry form.







To verify which records, if any, have not been finalized, examine the records in the list. Check for asterisks to the left of the entries in the **Group Name** column. For example:

	Delete	New Service Like This One	View or Edit This Record	Group Name	Service Date	Provider Code
<div> <p>This record has <i>not</i> been finalized.</p> <p>This record <i>has</i> been finalized.</p> </div>				mp test	1/7/2004	KJB001
				* mp test	1/23/2004	MNP

If you would like to finalize a record that does not display an asterisk, you can do so as explained next.


Open a Record to Review or Edit It


If you wish to review or edit a record in the list, do the following:

	Delete	New Service Like This One	View or Edit This Record	Group Name	Service Date	Provider Code
				mp test	1/7/2004	KJB001
				* mp test	1/23/2004	MNP

- 1 Click on the icon in the **View or Edit this Record** column. A window will open displaying Part 1 of the multi-page **Service Data Entry** form for that record. (See Chapter 2: Entering Services for more information.) If the record has already been finalized, you may only be able to view the record.
- 2 If the record has not yet been finalized, you will now be able to edit the record. If you need to edit a different part of the multi-page form, click one of the numbers at the top to take you to the appropriate section, as follows:

<div> 1 2 3 4 </div>	1 - Basic Information
	2 - Session Information
	3 - Service Statistics
	4 - User-Defined Fields

- 3 When your entries are exactly the way you want them, be sure to click , which will finalize the record. You will be returned to the start of a new record to enter.

4 To verify that the record now displays an asterisk, click  [Home](#) in the upper right corner of the window to return to the MDS main menu.

5 On the main menu, click **Edit Service** once again.




6 When the list opens, filter and sort the list as you had before to locate the record in the list. Check to see that it now displays an asterisk.

7 If for any reason you need to edit the record again after you have finalized it, you may need to contact your system administrator for assistance.

Delete Records That You No Longer Need

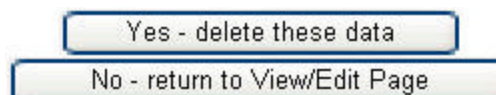
Sometimes you may want to remove records in the list. For example, you may wish to delete one or more empty records that were created automatically during your current session, or in a previous session. Empty records typically appear on the list with the title 'NO GROUP NAME' in the **Group Name** column. They usually display a few fields of system-generated information such as a default service date.

If you wish to delete a record in the list, do the following:

1 Click the trash can icon  next to the record in the list that you wish to delete.



2 A confirmation window will open, asking if you're sure you want to delete this record. If so, click **Yes, delete these data**. Otherwise, click **No**.



3 You will be returned to the start of a new record to enter. If you have no records to enter in this session, click  [Home](#) in the upper right corner of the window to return to the MDS main menu.

4 To verify that the record has been deleted, on the MDS main menu, click **Edit Service** once again.

[Edit Service](#)

View/Edit Services already entered.

- 5 When the list opens, filter and sort the items as you had before to recreate your previous list. Check to see that the record has been deleted.

Create Reports



The Create Reports option enables you to generate a variety of reports according your specific selection criteria. You can produce some reports in table format and others in graphic format, as well as export data from various reports into your own spreadsheet program. You can use a number of data filters to retrieve information on specific periods, service types, and levels of detail. This chapter:

- Provides an overview of the available reports
- Demonstrates how to select criteria and generate a table or graphic report
- Explains how to copy images or tables from an MDS report into a document
- Tells how to export data to Excel.

To generate a report, click **Create Reports** on the MDS main menu:

	Add Service	Enter a new Service record.
	Edit Service	View/Edit Services already entered.
	Create Reports	Create a report from selected services or all available services.
	Administration	Edit, view, add administrative data items (e.g., Staff, Activity Codes).
	Your User Information	Change your password and other user information.
	Logout	End your current session.

MDS main menu for general users

Overview of MDS Reports

In the **Create Reports** window that opens next, you will see a lengthy report menu listing reports in the following categories, explained in more detail below:

- Services Provided
- Gender and Age
- Gender and Race/Ethnicity
- CSAP Strategy Reports
- Detailed Reports
- Graphic
- Export

Services Provided Reports

Services Provided Reports summarize the prevention service types provided to service recipients. Three reports are available as tables:

Create Reports	
Report Description	Report Types Available
Services Provided	
Summary	TABLES
Services by Service Type	TABLES
Services by Service Population	TABLES

When you click the **Tables** button for any of these reports, you will be able to select the report criteria.

Gender and Age Reports

Gender and Age Reports summarize prevention service activity according to the gender and age of the service recipients. Three reports are available as tables:

Gender and Age	
Summary	TABLES
Gender and Age by Service Type	TABLES
Gender and Age by Service Population	TABLES

When you click the **Tables** button for any of these reports, you will be able to select the report criteria.

Gender and Race/Ethnicity Reports

Gender and Race/Ethnicity Reports summarize prevention service activity according to the gender and race/ethnicity of the service recipients. Three reports are available as tables:

Gender and Race/Ethnicity	
Summary	TABLES
Gender and Race/Ethnicity by Service Type	TABLES
Gender and Race/Ethnicity by Service Population	TABLES

When you click the **Tables** button for any of these reports, you will be able to select the report criteria.

CSAP Strategy Reports.

CSAP Strategy Reports summarize the prevention service activity according to the program strategy employed by CSAP. Two reports are available as tables:

CSAP Strategy Reports	
Services by CSAP Strategy	TABLES
Services by Service Population and CSAP Strategy	TABLES

When you click the **Tables** button for any of these reports, you will be able to select the report criteria.

Detailed Reports

Detailed Reports provide a detailed reporting of prevention service activity according to predefined criteria. Eight reports are available as tables:

Detailed Reports	
Edit	TABLES
User-Defined Fields	TABLES
Services by CSAP Strategy	TABLES
Services by Service Date	TABLES
Services by Activity Code	TABLES
Services and Age by Service Population	TABLES
Services and Race/Ethnicity by Service Population	TABLES
Incomplete Records	TABLES

When you click the **Tables** button for any of these reports, you will automatically generate a report that uses preset criteria rather than your own.

Graphic Reports

Graphic Reports display the results of the selected report in a graphical format. Six reports are available:

Graphic Reports	
Materials Disseminated by Service Population	GRAPHIC
Demographics	GRAPHIC
Services by Service Population	GRAPHIC
Services by CSAP Strategy	GRAPHIC
Services by CSAP Strategy and Service Type	GRAPHIC
Services by CSAP Strategy and Service Population	GRAPHIC

When you click the **Graphic** button for any one of these reports, you will be able to select the report criteria.

Download Report

The **Download Data** feature enables you to download report information for further analysis in your own statistical program or spreadsheet. You can export your report data in the Microsoft Excel format.

Download	
Download Data	DOWNLOAD

Select Criteria to Generate a Table or Graphic Report

Clicking the **TABLES** button for any table reports except the Detailed reports, or clicking the **GRAPHIC** button for any of the graphic report options, will open a window that displays report selection criteria.

For example, if you click the **Tables** button for the report called **Gender and Age by Service Type**:

Gender and Age	
Summary	TABLES
Gender and Age by Service Type	TABLES
Gender and Age by Service Population	TABLES

You will see the **Create Reports** window open displaying selection criteria in the form of **Data Filters** and **Categories**. Each section is explained below.

Data Filters

At the top of the window is the **Data Filters** section. The **Report Name** is predefined by the system. Each of the other filters is explained below.

Create Reports

Home ??? FAQ ? Help
Report Menu

Data Filters

Report Name: Gender and Age by Service Type

Reporting Period: 12/17/2003 - 4/14/2004: Within System Time Limit

Custom Date Range: to

Query Options:

Service Type: Combined
Demographics Indicator: Combined
Level of Detail: Show Substates

To select a date range, click to open the drop-down menu, or enter a custom date range.

Reporting Period	<p>The Reporting Period determines the date range for the records that will appear in the report. The default value is the entire range of dates in the system.</p> <p>To select a date, click to open the drop-down menu. Select the date range you desire by clicking on it. Alternatively, you may type in a custom date range.</p>
-------------------------	--

<p>Query Options:</p> <p>Service Type: Combined</p> <p>Demographics Indicator: Combined</p> <p>Level of Detail: Show Substates</p>	<p>Three types of Query Options exist: Service Type, Demographics Indicator, and Level of Detail.</p> <ul style="list-style-type: none"> • Service Type - refers to single services, recurring services, or a combination of the two. Select the option desired; the default value is Combined. • Demographics Indicator - refers to records containing estimated demographic data, records containing actual data, or a combination of the two. Select the option desired; the default value is Combined. • Level of Detail - refers to the following options: <ul style="list-style-type: none"> • Show Substates (which displays geographic region, county, or district where the provider is located) • Show Providers (which displays the names of service providers) • Show Staff (which displays the names of staff)
---	---

	<p>responsible for administering the programs).</p> <ul style="list-style-type: none"> Select the option desired; the default value is Show Substates.
--	---

Categories

Below the **Data Filters** section is the **Category** section of the window. In the **Category** section, you may select criteria from seven different categories:

- Providers
- Staff
- Activity Codes
- Service Populations
- Service Types
- Substate Entities
- Strategies

When you click each category, a list of possible values for that category will appear in the **Values** section of the window. Select all of the values you wish to include in your report, then move on to another category. You may choose values from all categories for a single report.

For example, you can run a report to focus on specific providers in your area. Assuming that all of the **Data Filters** (above) are left at their default values for this example, you can generate a **Provider** report as explained below.

- 1 To select specific providers for your report, click the **Providers** category:

Category	Values
PROVIDERS	<p>Choose a category from the list on the left, then this area will show a list of possible values for that category. Select all values that you wish to include in your report. Values from all categories can be chosen for a single report.</p> <div> <p>Providers: All</p> <p>Staff: All</p> <p>Activities: All</p> <p>Service Population: All</p> <p>Service Type: All</p> <p>Substate Entities: All</p> <p>Strategies: All</p> </div>
STAFF	
ACTIVITY CODES	
SERVICE POPULATIONS	
SERVICE TYPES	
SUBSTATE ENTITIES	
STRATEGIES	

CLEAR ALL FIELDS
GENERATE REPORT

- 2 A list of values opens (note that your list of providers will be different):

Category	Values
PROVIDERS	Hold down the Ctrl key (Windows) or the Command key (Macintosh) while clicking to select multiple values. When you've finished making your selection, press Done .
STAFF	
ACTIVITY CODES	
SERVICE POPULATIONS	
SERVICE TYPES	

12345: Lompoc Healthcare Providers
 44744: Boys & Girls Clubs
 55421: Jefferson High School
 55435: YMCA
 55588: Tri-City Drug Aversion Program Coalition

- 3 Do one of the following to choose providers from the list:

- To select a *single* value in the list, simply click that value:

Category	Values
PROVIDERS	Hold down the Ctrl key (Windows) or the Command key (Macintosh) while clicking to select multiple values. When you've finished making your selection, press Done .
STAFF	
ACTIVITY CODES	
SERVICE POPULATIONS	
SERVICE TYPES	

12345: Lompoc Healthcare Providers
44744: Boys & Girls Clubs
 55421: Jefferson High School
 55435: YMCA
 55588: Tri-City Drug Aversion Program Coalition

- To select *more than one* value in the list, so that you can report on multiple providers, as will be the case in this example:

Click the first value, then hold down the <Control> key on your keyboard while clicking the second and subsequent values:

Category	Values
PROVIDERS	<p>Hold down the Ctrl key (Windows) or the Command key (Macintosh) while clicking to select multiple values. When you've finished making your selection, press Done.</p> <div> 12345: Lompoc Healthcare Providers 44744: Boys & Girls Clubs 55421: Jefferson High School 55435: YMCA 55588: Tri-City Drug Aversion Program Coalition </div>
STAFF	
ACTIVITY CODES	
SERVICE POPULATIONS	
SERVICE TYPES	

- 4 When you have made your selections, click the **Done** button at the bottom of the window:

CLEAR ALL FIELDS **DONE**

- 5 The selected options will now appear under **Providers** in the **Values** area:

Category	Values
PROVIDERS	<p>Hold down the Ctrl key (Windows) or the Command key (Macintosh) while clicking to select multiple values. When you've finished making your selection, press Done.</p> <p>Providers: 44744: Boys & Girls Clubs 55588: Tri-City Drug Aversion Program Coalition</p> <p>Staff: All Activity Codes: All Service Populations: All Service Types: All Substate Entities: All Strategies: All</p>
STAFF	
ACTIVITY CODES	
SERVICE POPULATIONS	
SERVICE TYPES	
SUBSTATE ENTITIES	
STRATEGIES	

CLEAR ALL FIELDS GENERATE REPORT

- 6 If you wish to select additional criteria from other categories, repeat the process for each desired category, choosing values from each list in the same way. At any time, you can click **Clear All Fields** to remove all the selections you have made, if you wish to make new one.

- 7 When you are ready to run the report, click **Generate Report** at the bottom of the window:

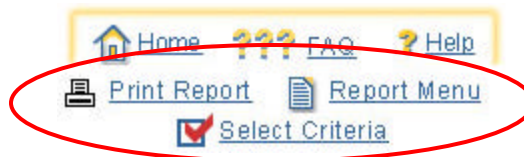
[CLEAR ALL FIELDS](#) [GENERATE REPORT](#)

- 8 The example **Providers** report for the selected criteria appears below, shown in the form of a table.

Gender and Age by Service Type Grouped by Substate Entity Reporting Period 02/04/2002 to 02/05/2003													
Criteria List													
Providers:													
44744: Boys & Girls Clubs 55588: Tri-City Drug Aversion Program Coalition													
Substate	Total Served	Male	Female	0-4	5-11	12-14	15-17	18-20	21-24	25-44	45-64	65+	
Community Drop-In Center Participants	14	8	6	0	4	10	0	0	0	0	0	0	
Community Services Attendees	38	22	16	0	0	7	10	13	8	0	0	0	
ALTERNATIVES Total	52	30	22	0	4	17	10	13	8	0	0	0	
Speaking Engagement Attendees	82	30	52	0	0	0	0	0	0	24	44	14	
INFORMATION DISSEMINATION Total	82	30	52	0	0	0	0	0	0	24	44	14	
Statewide Total	144	66	78	0	6	25	10	13	8	24	44	14	

Sample table report for selected providers

- 9 If you had selected a graphic report instead of a table report (by clicking a **GRAPHIC** button next to one of the **Graphic Reports** on the report menu), the body of your report will contain an image such as a pie chart or graph.
- 10 Other options appear the upper right corner of each report window:



- Click **Print Report** to open a printer-friendly version of the report. Click your browser's **Print** button to print the report. You can close the window when you are finished printing.
- Click **Select Criteria** to return to the previous page to select additional or new criteria for filtering reports.
- Click **Report Menu** to return to the main menu of report options. You can continue in the same manner to select subsets of data and to create new reports.

Copy Graphics or Tables From an MDS Report into Another Document

If you wish to use graphics or tables from an MDS report in another document, you can capture the screen image and paste it into your report. Try the following on a Windows-based computer:

Copying Graphic Images

- 1 While the graphic image appears on your screen, hold down the <Alt> key on your keyboard while pressing the <Print Screen> key. This will place a copy of the image in your Windows clipboard.
- 2 Open a graphic editing program such as Windows Paint. Select **Edit > Paste** from the main menu.
- 3 Use the cropping tool to select the part of the image that you want to save.
- 4 Select **Edit > Copy** from the main menu to copy just this part of the image to the Windows clipboard.
- 5 Open the word processing document in which you wish to paste the image.
- 6 Select **Edit > Paste** from the word processing program's main menu, and the cropped image will appear in your document.

Copying Tables

If you wish to copy a table from an MDS report to a document, most word processing software will let you paste in the table directly into it, as follows.

- 1 With the MDS table appearing on your screen, use your pointer to select around the table you want to copy, dragging the pointer from the top to the bottom of the table you want to copy.

- 2 Select **Edit > Copy** from your browser's main menu bar.
- 3 Open the word processing document into which you wish to paste the table.
- 4 Select **Edit > Paste** from the word processing program's main menu.

Download Data to a Spreadsheet or a Statistical Program

Another feature of the MDS reports menu is that it lets you to download the report data to your own computer, so that you can analyze or reformat it with your own application. Try the following:

- 1 Click the **Download** button at the bottom of the reports main menu:



- 2 The familiar **Create Reports** opens, but there is a new item in the **Data Filters** list: the **Export Format** field. The only option currently available from the drop-down menu is **Microsoft Excel**.
- 3 Once you have made your **Data Filters** selections (**Reporting Period** and **Query Options**) and **Category** choices, click the **Generate Report** button:



- 4 The next window that opens provides a link to download the report file you have created. You will be able to **Save** the file to your computer, or **Open** it and save it from the application software.
- 5 If you choose to save the file to your hard disk, right-click on the link, and in the right-mouse menu that opens next, scroll to **Save Target As**. Select a location and a name for the report file you are saving. If the file is large, expect it to take a while to download.
- 6 Once the file is on your hard drive, you can open it in your chosen application.

Maintain Your User Information



Whenever you need to change your user information in MDS, you can do so quickly and easily by accessing **Your User Information** from the main menu. Note that Chapter 1: Logging Into MDS discussed how to use this section to change your password. This chapter summarizes how to update your user information in general.

- 1 In the MDS main menu, click **Your User Information**.

	Add Service	Enter a new Service record.
	Edit Service	View/Edit Services already entered.
	Create Reports	Create a report from selected services or all available services.
	Administration	Edit, view, add administrative data items (e.g., Staff, Activity Codes).
	Your User Information	Change your password and other user information.
	Logout	End your current session.

MDS main menu for general users

- 2 The **Administrative Data Entry: Existing Staff** window will open, as shown in the example below:

Name	<input type="text" value="Rosa Ramirez"/>
Login	<input type="text" value="rosa"/>
Password	<input type="password" value="*****"/>
Address (line 1)	<input type="text"/>
Address (line 2)	<input type="text"/>
City	<input type="text"/>
State/Jurisdiction	<input type="text" value="Maryland"/> ▼
ZIP Code	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Substate	<input type="text" value="Other/Out-of-State"/> ▼
Provider	<input type="text" value="No Provider Entered"/> ▼
Data Entry Form	<input type="text" value="Four-Page Data Entry Form"/> ▼
<input type="button" value="SAVE & CONTINUE"/> <input type="button" value="RESET"/>	

You change your user information in this window

- 3** Make changes as desired to the information in the various fields.

Note: If you are changing your password, backspace to clear the current information, then type in the password of your choice. Make it at least 6 characters long, and try to use both letters and numbers. Keep your password safe, and don't display it anywhere near your computer.

- 4** Click if you wish to discard your changes or click to save your updated information in the system. You will then be returned to the main menu.

Comments Are Requested on This Review Copy

If you have comments or questions on this review copy, including requests for enhancement, corrections, or tips on using certain MDS features, please contact one of the following people:

- Dottie Natal (e-mail: dottie@imagenmm.com), or
- Heiko Schwarz (e-mail: <mailto:heiko@imagenmultimedia.com>)

Imagen Multimedia

(805)735-7576 voice
(805)735-8322 fax
300 North G Street
Lompoc, CA 93436